Professional Learning EXCHANGE

DBE Learning Exchange

Continuing Education to
Optimize Minority Business
Development

2006 Course Handbook



2006 Course Outline

Course	Instructor	Date	Time
SCHEDULING & COST CONTROLS	Leroy Isidore, Ph.D. The Allen Group, LLC	January 11, 2006	5:00 – 8:00P
QUALITY ASSURANCE, QUALITY CONTROL	Lou Williams, QA Engineer	April 25, 2006	5:00 – 8:00P
CHANGE ORDER PROCESS	Jeff Neumayer, P.E.	July 12, 2006	5:00 - 8:00P
BONDING & INSURANCE	Ingrid Merriwether & James Drake	October 4, 2006	5:00 – 8:00P
PROJECT MANAGEMENT	TBD	December 13, 2006	5:00 - 8:00P

The workshops are designed for the prime consultant to transfer technical knowledge, including lessons learned to small, DBE firms. For more information on the DBE Learning Exchange, contact Karen Hollis at HollisK@miamidade.gov

DBE Learning Exchange has been established as part of Miami-Dade Transit's proactive plan to ensure that DBE and local firms will have an equitable opportunity to compete for contracts and subcontracts. This program is for DBE firms that are interested in:

- Growing their business beyond the "sole proprietorship;"
- · Developing capabilities to optimize minority business development;
- Obtaining Full Access of the Financial Markets; and
- Diversifying or expanding to seize opportunities in growth industries.



EFFECTIVE PROJECT SCHEDULING & COST CONTROLS

Sessions	Dates	Times	Cost
Scheduling & Cost Controls	January 11, 2006	5:00 – 8:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

Participants will achieve: the skill and confidence to use a practical project planning technique; the ability to determine if a project can truly be delivered on time and within budget; an understanding of how to identify the risks necessary to meet a constrained delivery date; the confidence to clearly communicate project delivery and set attainable goals with clients, managers, and project team members.

Who Should Attend?

DBE firms who, now or in the future, will be leading or participating in a project team and anyone needing an in-depth knowledge of how to plan and control a project.

Course Description

Today, more and more businesses deal with shrinking project timelines and delivering products with limited resources. This course will guide participants in developing a project schedule to account for key factors of resource availability. Participants will also learn to use an integrated schedule and cost – progress reporting tool to evaluate project status and forecast future performance, so they keep the project in control.

Develop effective measures for scheduling and controlling projects as you put the tools of project management to work. In this course you'll focus on managing the constraints you face in any project: limits on time, human resources, materials, budget, and specifications. Discover proven ways to work within your identified constraints, without letting predefined limits curtail creativity or innovation.

You'll learn a sound, logical framework for scheduling and controlling project activities which will allow you to master techniques for forecasting, budgeting, monitoring, controlling, analyzing, and reporting costs, and interpreting the meaning of earned-value data.

Discover a number of sophisticated tools that you can use to manage time and costs effectively on every type of project. This is one of the program's most popular courses; classes fill up quickly, so register early.

Who Will Benefit?

Project managers, team leaders, and professionals who need in-depth knowledge of how to develop a schedule and what controls are needed to maintain a project schedule.

Seminar Highlights

- The ability to develop an accurate project schedule, accounting for all project activities, the resources needed to complete project activities, and the availability of the resources.
- The knowledge of how to compare actual project progress against a project baseline to identify and control variances.
- The confidence to evaluate and communicate project trade-offs clearly to project sponsors.
- The ability to forecast if a project can be delivered on time and within a budget.

What you will learn

- Activity Definition and Sequencing determining all activities to complete project work and how they interrelate, developing a project network diagram and using the critical path method (CPM).
- Activity Duration Estimating and Resource Scheduling the manner in which durations, person effort, and resource availability affect each other.
- Progress Reporting how to report cost & schedule information to provide project status, and forecast future project performance.
- Schedule Control how to identify variances between actual performance and the project baseline, and evaluate the options to
 determine the best resolution to the variance.
- Use the work breakdown structure to develop a network diagram
- Calculate schedules using CPM
- Predict costs and work time from estimates
- Plan for contingencies and anticipate variations
- Predict future project performance based on historical data
- Monitor changes and close out projects on time



QUALITY ASSURANCE / QUALITY CONTROLS

Sessions	Dates	Times	Cost
Quality Assurance/ Quality Controls	April 25, 2006	5:00 – 8:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

Participants will learn: the activities of Quality Assurance to ensure (1) project requirements are developed to meet all quality requirements; (2) staff and equipment are available and capable of performing the task; (3) consultants and contractors are capable of meeting the planned quality requirements; and (4) identifying opportunities for improvements through the results obtained from quality audits); the activities of Quality Control by performing inspections to include (1) taking measurements, testing, and inspecting a process or product; (2) the process of witnessing or attesting to, and documenting actions; and (3) the review of drawings and check calculations during design; the FTA QA/QC fifteen elements derived from the 1987 version of the American National Standards for Quality Systems; the eight clauses contained in the latest version of the ISO standard.

Who Will Benefit

Project managers, contractors, subcontractors, developers, principals, owners, suppliers, architects, engineers, contract administrators.

Seminar Highlights

- Essential Elements of QA/QC Systems
- Overview of the 15 Quality Elements
- Organization of a Quality Management System
- Grantee Organization & Responsibility
- Project Management Plan Guidelines (PMP)
- Grantee Oversight
- Personnel Qualifications
- Project Quality Plan Development

What You Will Learn:

- Management Responsibility
- Documented Quality Management System
- Design Control
- Document Control
- Purchasing
- Product Identification & Traceability
- Process Control
- Inspection, Measuring & Test Equipment
- Nonconformance
- Corrective Action
- Quality Records
- Quality Audits
- Training

How to Register:



CHANGE ORDER PROCESS TRAINING

Sessions	Date	Time	Cost
Change Orders	July 12, 2006	5:00 – 8:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This seminar is designed to focus on the issues that must be properly addressed when negotiating and evaluating change orders and to provide attendees with the information needed to help an organization avoid the added time added time and expense of having to resolve and renegotiate unexpected claims when the project is completed. A change order can be defined as a contract modification.

Topic Discussions:

- General Overview of Contract Law
- Why Use a Change Order?
- Authority And Responsibility For Change Order Work
- Change Orders, Construction Change Directives And Minor Changes In The Work
- Contract Modification Due To Differing Site Conditions
- Contract Modification Due To Defective or Ambiguous Plans Or Specifications
- Contract Modification Due To Project Delays
- Claims Based Upon Contract Modification; Analysis of Typical Scenarios Involving Change Orders.

Who Should Attend?

Project managers, contractors, subcontractors, developers, principals, owners, suppliers, architects, engineers, contract administrators, insurance professionals, public works directors, lenders

Course Description:

As a professional involved in construction projects, you know how important it is for change orders to accurately reflect the intent of all of the parties involved. Hastily negotiated and vaguely drafted change orders fail to express the intent of parties, and more often than not lead to unwanted and unnecessary disputes at the conclusion of the project.

This highly informative seminar will focus on key issues that must be properly addressed when negotiating and evaluating change orders, and provide you with the information you need to help your organization avoid the added time and expense of having to resolve and renegotiate unexpected claims when the project is completed. Discussion will also focus on how to efficiently and effectively audit change orders.

Who Will Benefit?

This seminar is designed for project managers, contractors, subcontractors, developers, principals, owners, suppliers, architects, engineers, contract administrators, public works directors, lenders, accountants, consultants, procurement directors and attorneys.

Seminar Highlights:

- Introduction To Change Orders
- Key Issues To Be Addressed
- Pricing The Change
- Scheduling Of Change Orders

How To Register:



BONDING AND INSURANCE

Sessions	Date	Time	Cost
Bonding and Insurance	October 4, 2006	5:00 – 8:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This program will provide insight and practical advice from construction lawyers to understand and address the complex issues entailed in procuring insurance and bond coverage, asserting claims against insurers and sureties and pursuing mechanic's lien claims. Seminar highlights: Other insurance issues; Performance bonds; Payment bonds.

Who Should Attend?

This one-day seminar is designed for attorneys, project managers, presidents, vice presidents, contractors, subcontractors, principals, owners, contract managers, developers, architects, engineers, accountants, insurance professionals, risk managers and other construction professionals.

Course Description:

BOND GUARANTEE

Provide guidance and assistance to DBE firms in securing bonding and working capital. Specifically to remove some of the obstacles that has historically prevented DBEs from obtaining bonds; such as

- inadequate financials
- insufficient working capital
- marginal financial ratios
- size of project greatly exceeds work history
- type of project is new to contractor
- inadequate labor resources.

The surety bond guarantees to the obligee or owner that the (principal, contractor or subcontractor) will perform on all terms and conditions as specified under his/her contract.

OWNER CONTROLLED INSURANCE PROGRAM (OCIP)

Provide guidance and assistance to DBE firms on the benefits of consolidated insurance coverage on a construction project; such as

- Reduced Insurance Cost by buying in bulk, greater discounts are afforded.
- Centralized Safety Program more concentrated and effective approach reduces claims and overall costs.
- Broader Coverage & Higher Limits better terms and increased coverage can be negotiated.
- Small & Minority Owned Business Participation DBE's are afforded workers compensation and general liability coverage

Who Will Benefi

The program will provide insight and practical advice from construction lawyers to understand and address the complex issues entailed in procuring insurance and bond coverage, asserting claims against insurers and sureties and pursuing mechanic's lien claims.

Seminar highlights:

- Other insurance issues
- Performance bonds
- Payment bonds

What You Will Learn:

- The attendee will be able to discuss commercial general liability insurance.
- The attendee will be able to identify federal project payment bond considerations.
- The attendee will be able to review Mechanics' Lien Law.

How To Register:



ESSENTIALS FOR SUCCESSFUL PROJECT MANAGEMENT

Sessions	Dates	Times	Cost
Project Management	April 25, 2006	5:00 – 8:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This workshop addresses both the interpersonal and technical sides of project management by focusing on how to: determine what needs to be done and create a plan; obtain organizational support and resources; utilize tools that assign priorities, interdependencies, time, and responsibility; use negotiating and influencing skills effectively; and manage both task and team needs.

Who Should Attend?

Managers, professionals without formal training in project management, those who want to improve their skills in planning, organizing and controlling organizational activities

Course Description:

To stay out front in today's rapidly changing business environment, organizations are increasing their project initiatives when the time and resources available for their completion may be constrained. The challenge for a project manager is to guide an initiative's tasks to successful completion within the given constraints by applying the right processes and tools and having the interpersonal skills to manage the project team. This workshop addresses both the interpersonal and technical sides of project management by focusing on how to:

- Determine what needs to be done and create a plan
- Obtain organizational support and resources
- Discover tools that assign priorities, interdependencies, time, and responsibilities
- Develop an array of professional interfacing skills to enhance team performance
- Coach and motivate team members

Who Will Benefit

Managers responsible for guiding project initiatives from their inception to completion. Professionals without formal training in project management, as well as those who want to improve their skill in planning, organizing, and controlling organizational activities.

Seminar Highlights

- Project definitions and the role of the project manager
- Assumptions, risks, and project scope
- Sequencing project activities to create a plan
- Essential tools and techniques for managing tasks
- Creating a resource assignment plan
- Communicating project-related information effectively
- Developing and using a monitoring-and-control process
- Conducting successful team meetings
- Motivating a team and team members effectively
- Implementing interpersonal strategies to achieve improved performance
- Reporting accomplishments and expenditures
- Software to assist in the project management process

How To Register:



Learning Exchange Course List

ALTERNATIVE DISPUTE RESOLUTION

ANNUA REVIEW OF OVERHEAD COSTS (Provisional & Final Rate)

BONDING & INSURANCE

CHANGE ORDER PROCESS TRAINING

COMPLIANCE & LIABILITY WITH DBE / NON-DISCRIMINATION PROGRAM REQUIREMENTS

CONTRACTS (Federal / Non-Federal Distinctions)

CONTRACTOR'S CHANGE PROPOSAL

ESTIMATING / BASIC QUANTITY TAKE-OFFS

FARS (Federal Acquisition Requirements – Part 31) - Cost, Principles, Record-Keeping / Invoicing

FILING OF PRELIMINARY LIEN NOTICES / STOP NOTICES

GUARANTY / WARRANTY

LABOR COMPLIANCE PROGRAM

MARKETING / BUSINESS DEVELOPMENT

OMBUDSPERSON

PAYMENT, RECORDS AND CLAIMS

PROGRESS PAYMENTS (Record Keeping and Billing)

PROJECT MANAGEMENT

RECEDENCE OF DOCUMENTS

RECORDS & AUDIT

RETENTION / CLOSE OUT (State & Federal Design Build Regulations)

SAFETY & ENVIRONMENTAL COMPLIANCE

SCHEDULING & COST CONTROLS

SMALL BUSINESS TECHNICAL ASSISTANCE

STATE LABOR CODE & DOT LABOR REQUIREMENTS

SUBCONTRACTING

SUBMITTAL REQUIREMENTS (Understanding the Contract – Certifications)

QUALITY ASSURANCE, QUALITY CONTROLS

WORKERS' COMPENSATION



REGISTRATION FORMS

REGISTRATION FORM Project Management Workshop	Tuesday, April 25, 2006
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM Change Orders Workshop	Wednesday, July 12, 2006	
Name of Attendee(s)		
Company Name		
Company Address		
Company Telephone		
Company Facsimile		

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REGISTRATION FO	DRM .
Bonding & Insurance Work	rshop Wednesday, October 4, 2006
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	



REGISTRATION FORM Quality Assurance, Quality Controls	Wednesday, December 13, 2006
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FO	DRM
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FO	DRM
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

